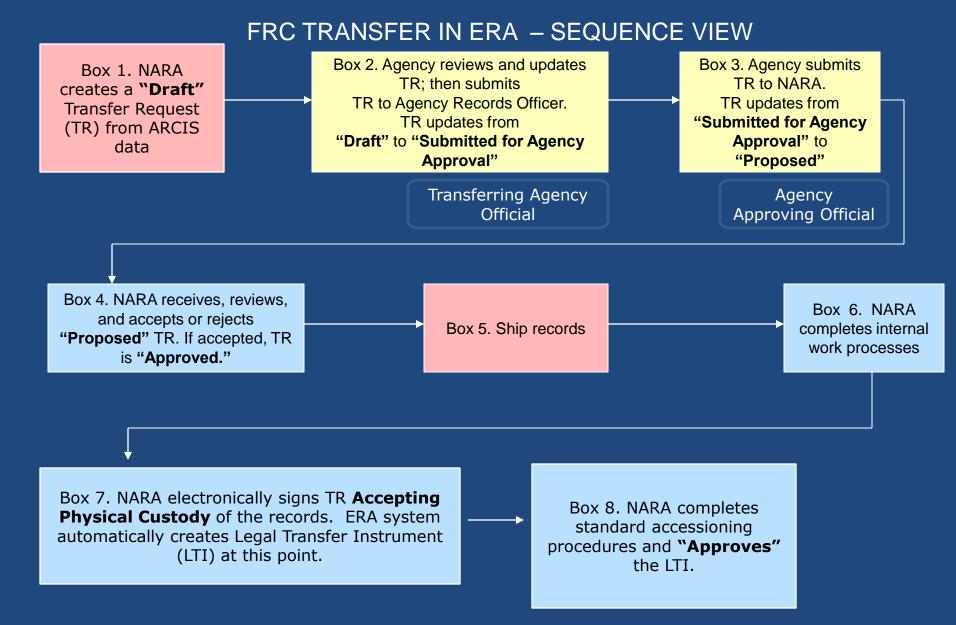


THE NATIONAL ARCHIVES AND RECORDS ADMINISTRATION ELECTRONIC RECORDS ARCHIVES

Using ERA for FRC Annual Move October 29, 2013

FRC Transfer in ERA

- Draft Transfer Requests (TRs) for eligible FRC Transfers
- Created by NARA from data derived from ARCIS
- One FRC transfer = one ERA Transfer Request
- Agency responsible for reviewing and proposing TRs
- Corrected information must be provided to FRCs and in ERA



Red = actions taken by NARA/FRC staff

Blue = actions taken by NARA/archival accessioning staff

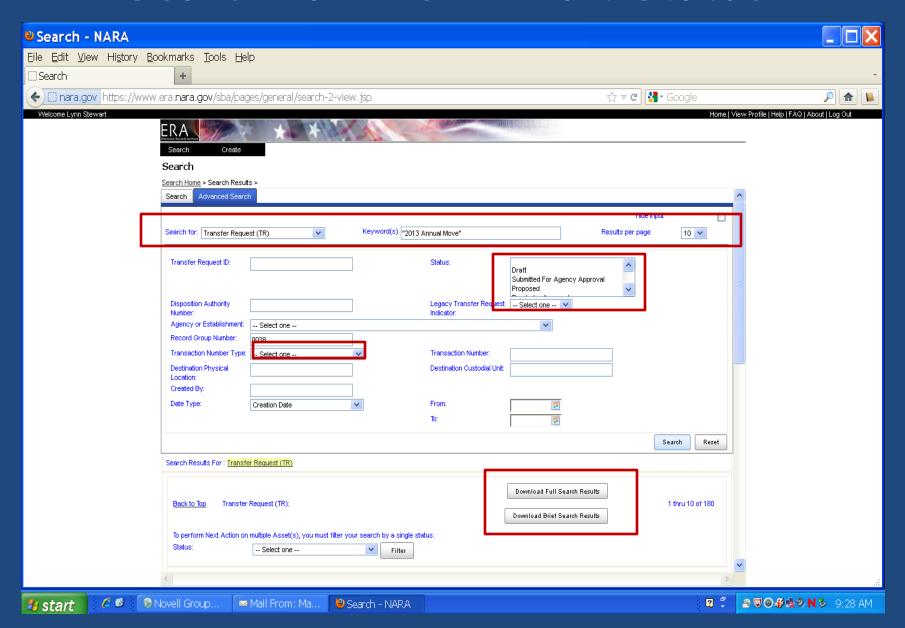
Yellow= actions taken by agencies

Note: One TR created for each FRC transfer

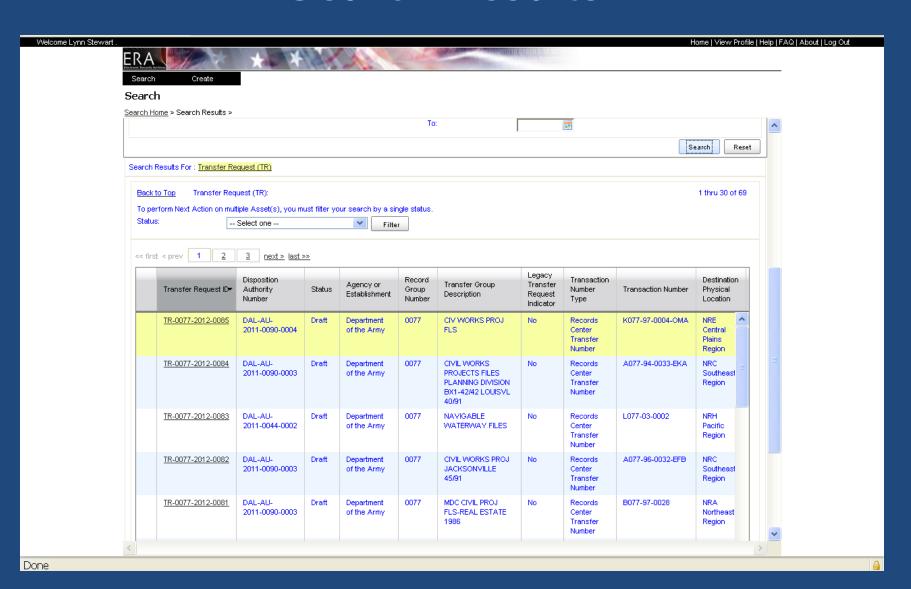
Search for Annual Move TRs

- Log in as Transferring Agency Official
- Search: Advanced Search
- Business Object: Transfer Request
- Keyword: "2014 Annual Move"
- Status: Draft
- Record Group Number: ####

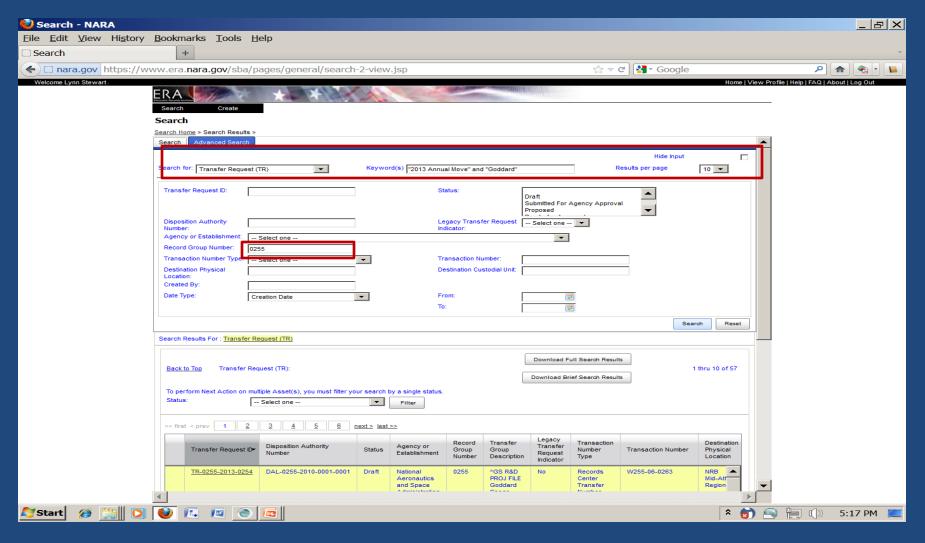
Search for TRs in Draft Status



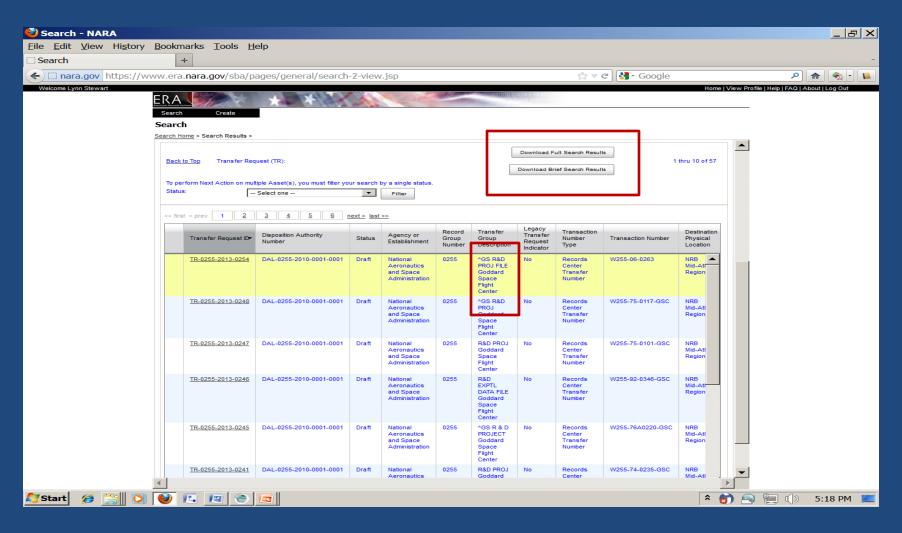
Search Results

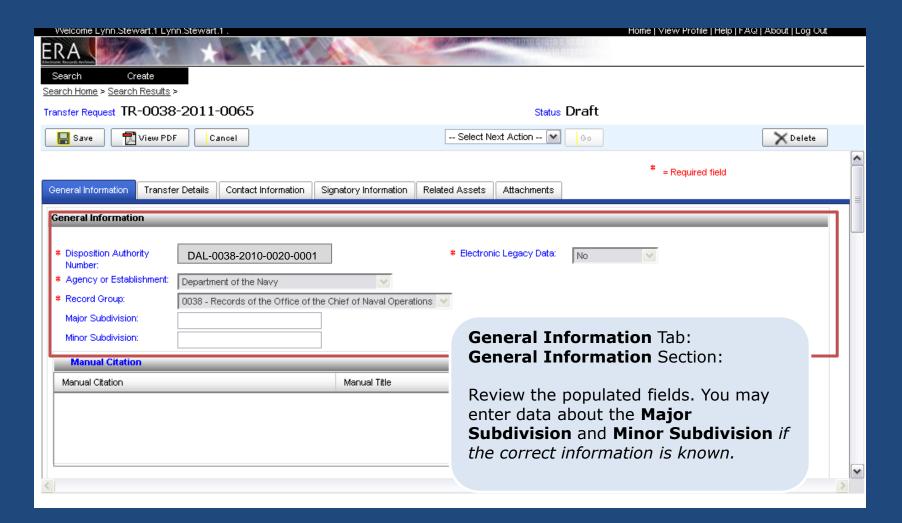


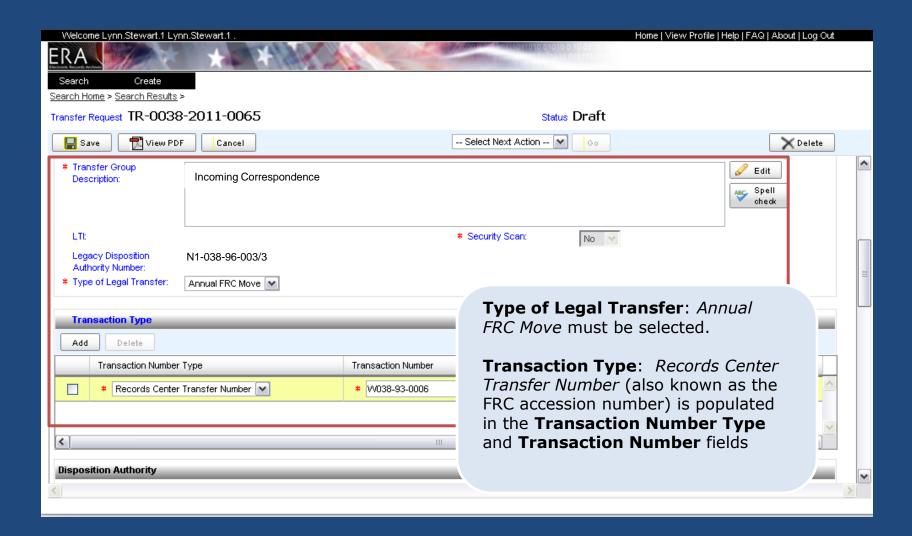
Search Strategies for Stratified Billing Customers

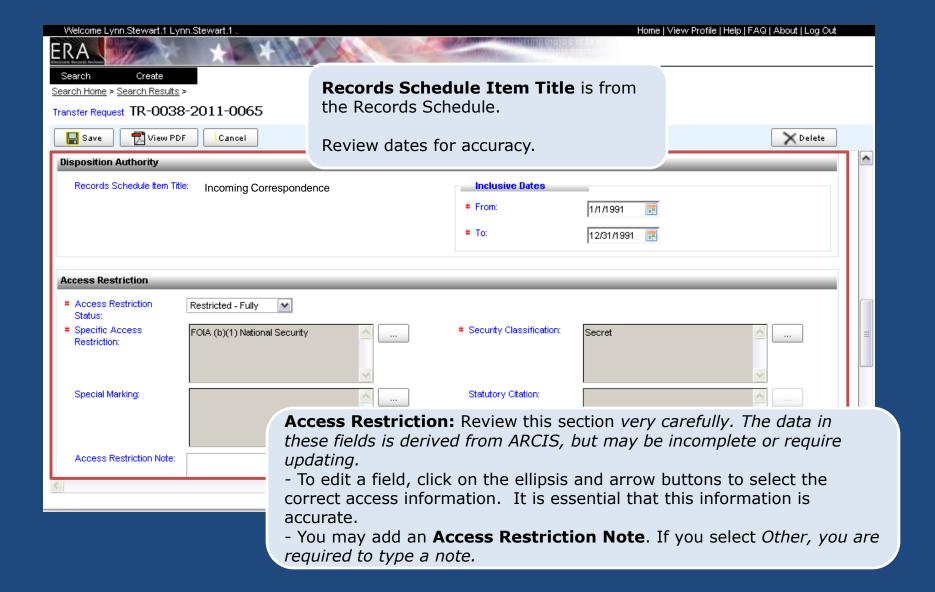


Search Results for Stratified Billing Customers

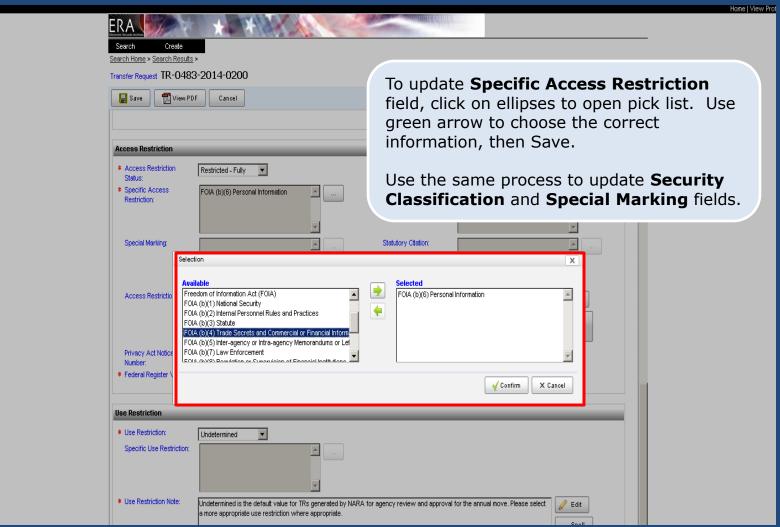




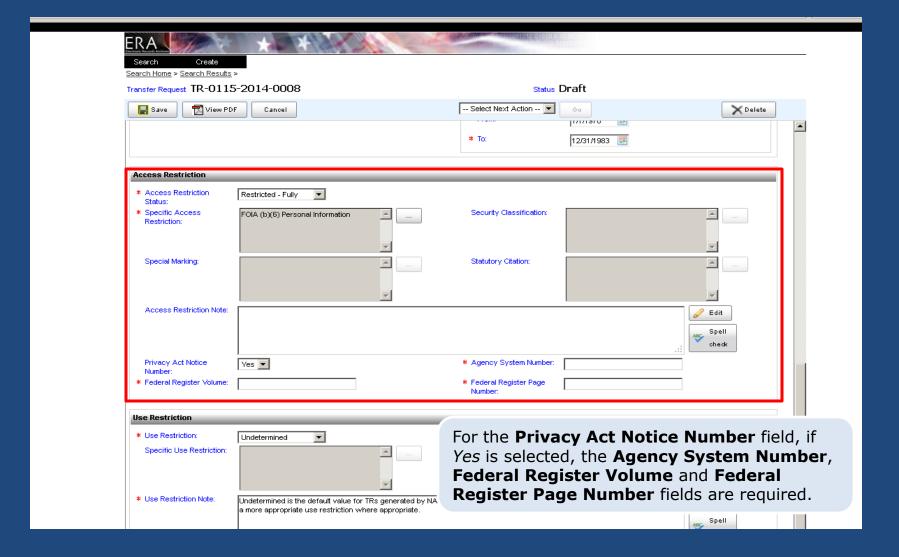




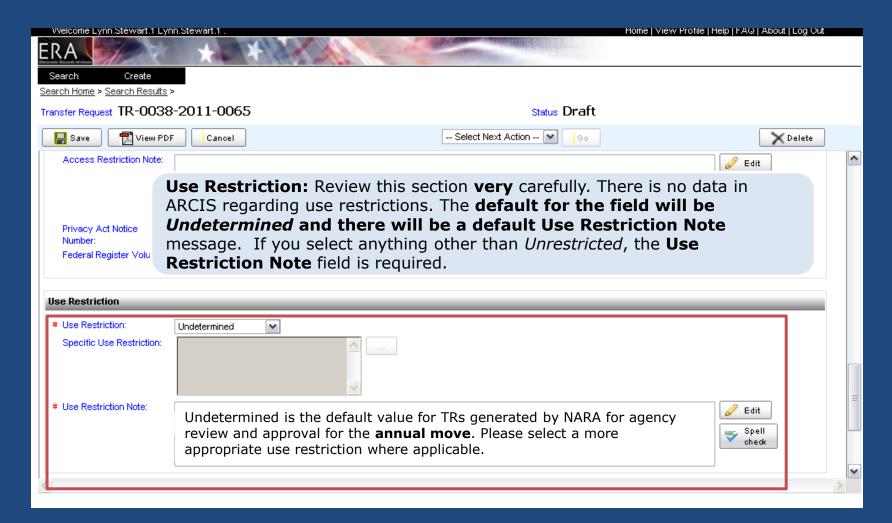
Transfer Request General Information Tab Updating Access Restriction Information

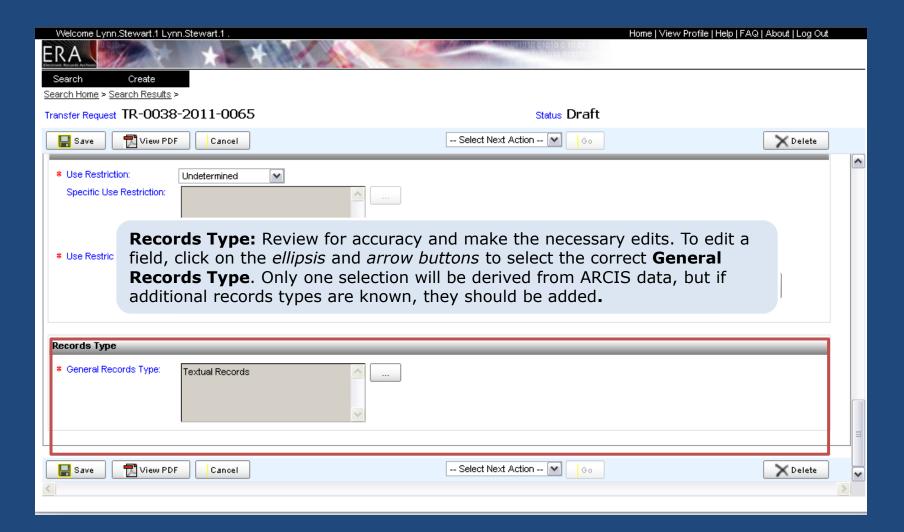


Transfer Request General Information Tab Privacy Act Notice (Yes)

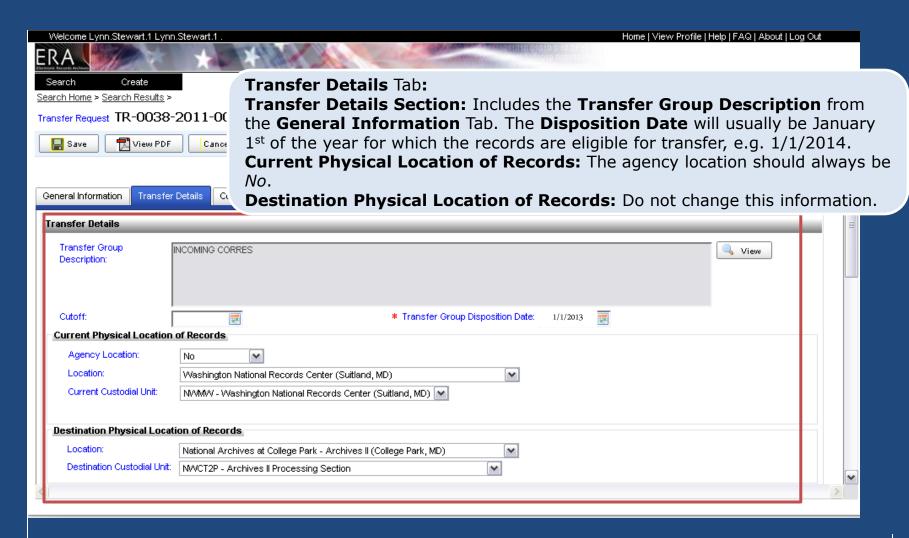


Transfer Request General Information Tab Use Restriction

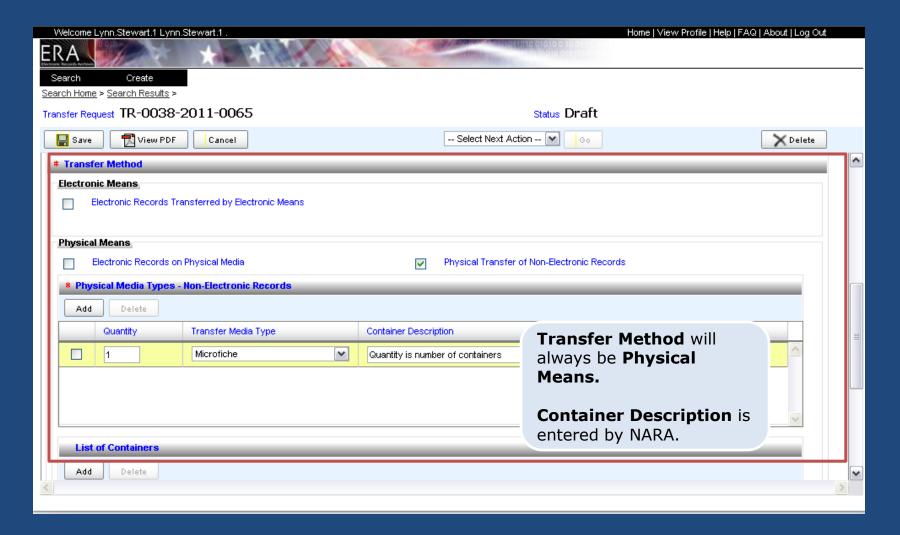




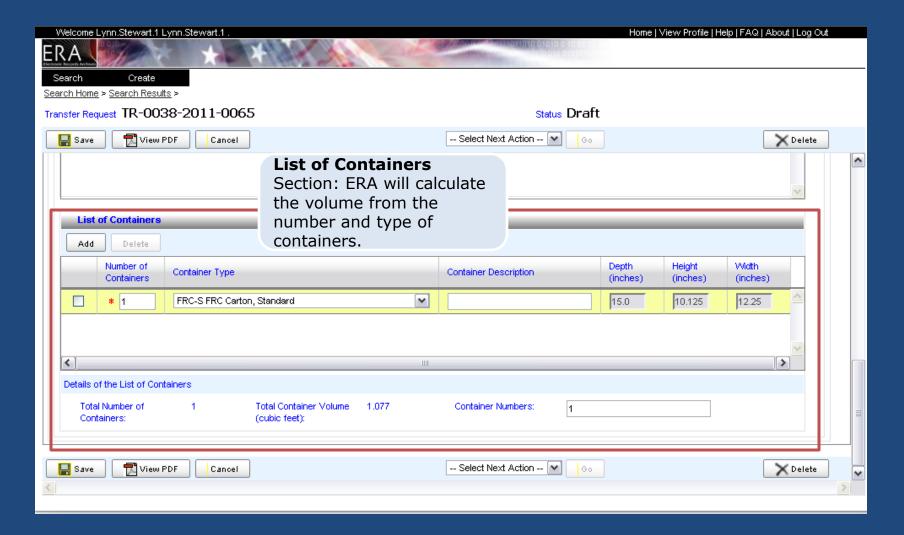
Transfer Request Transfer Details Tab



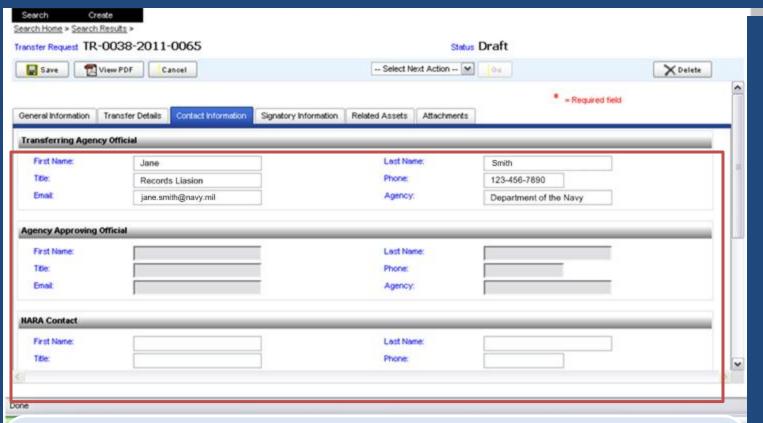
Transfer Request Transfer Details Tab



Transfer Request Transfer Details Tab



Contact Information Tab

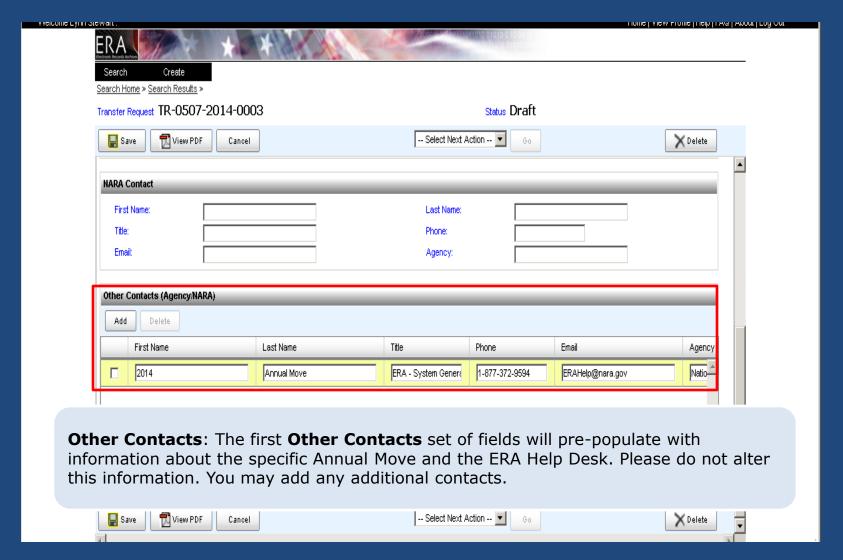


Transferring Agency Official: These fields populate from the *User Profile* except for the **Agency** field, which is derived from ARCIS. Please update your *User Profile* if needed.

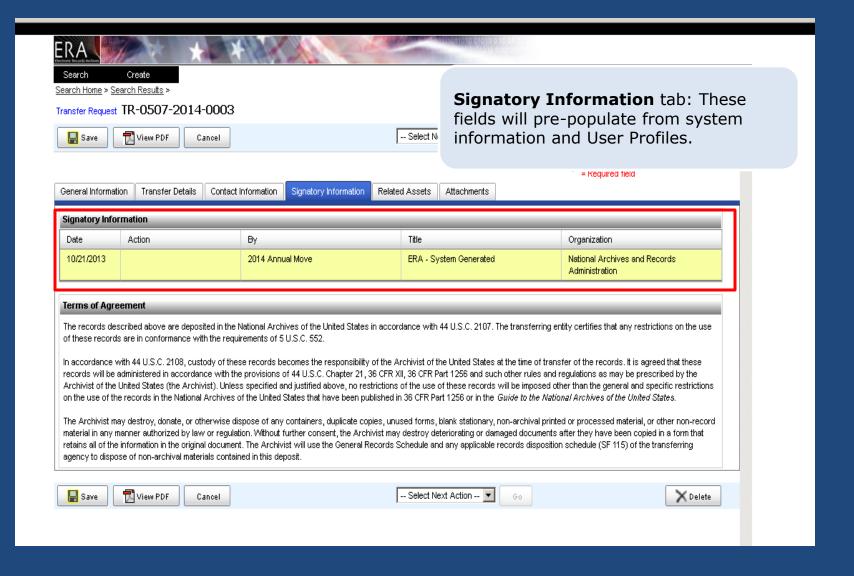
Agency Approving Official: These will fields populate from the *User Profile* after the **Agency Approving Official** submits the TR to NARA.

NARA Contact: Leave these fields blank. These will be completed NARA staff if needed.

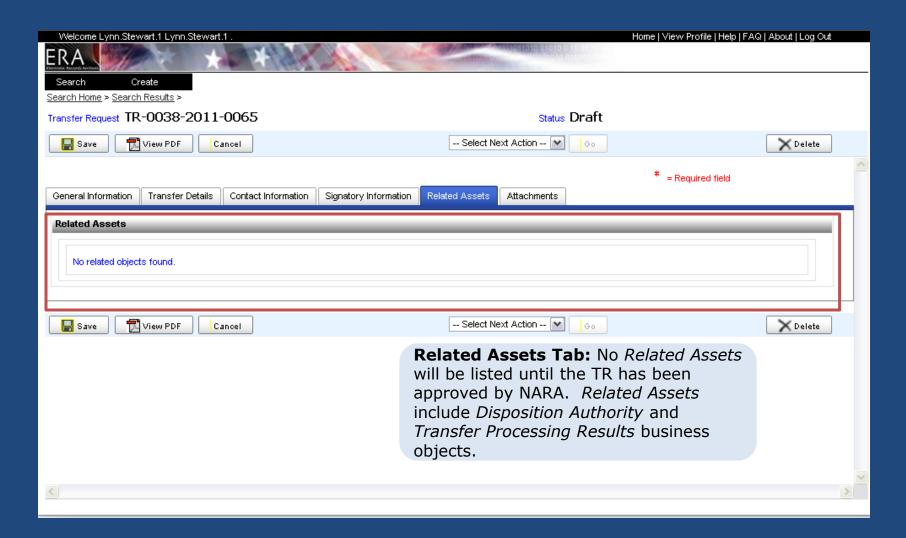
Contact Information Tab Other Contacts (Agency/NARA)



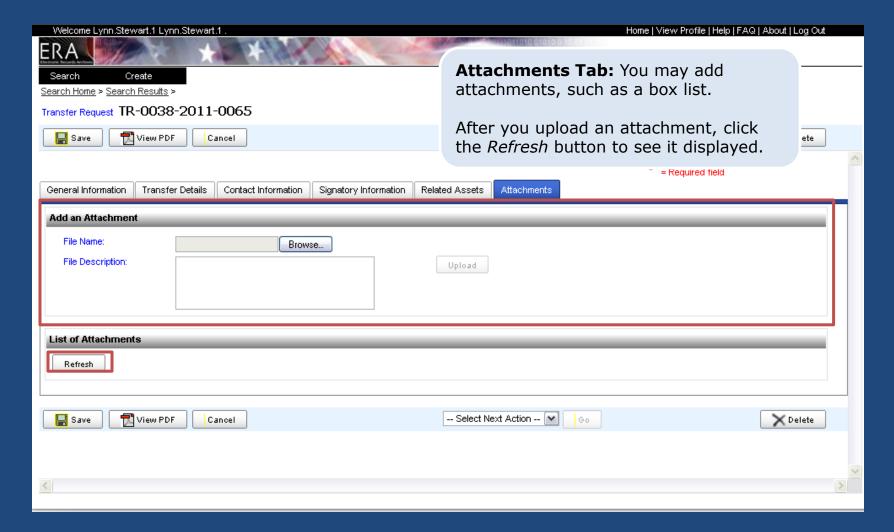
Transfer Request Signatory Information Tab



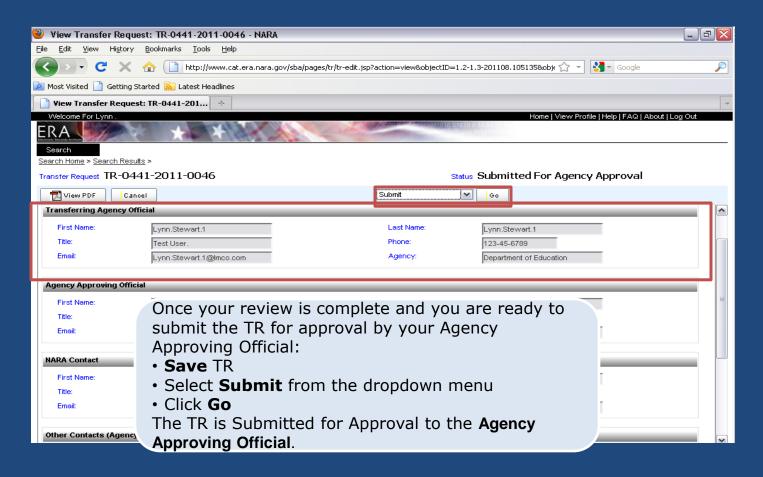
Transfer Request Related Assets Tab



Transfer Request Attachments Tab



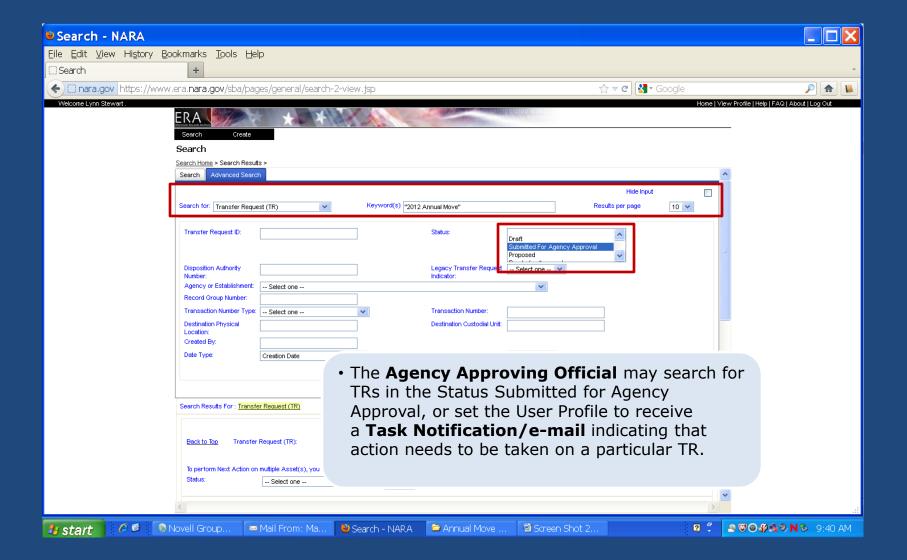
Transfer Request Submit for Agency Approval



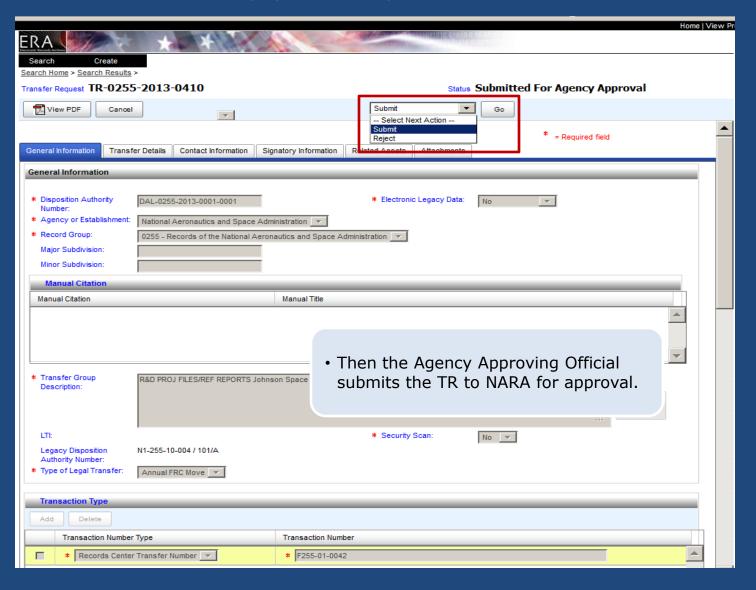
Transfer Request Propose TRs to NARA

- Agency Approving Official may Propose a TR for Approval by NARA. ERA will provide a task notification indicating that action needs to be taken on a particular TR. An Agency Approving Official may also reject a TR which will then return to Draft status.
- Agency Approving Official may also have the Transferring Agency Official role.

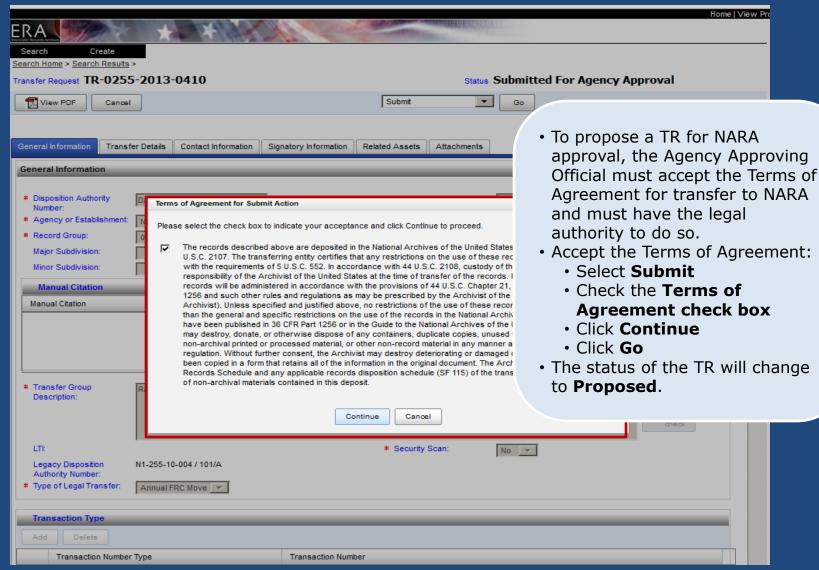
Transfer Request Search for Submitted for Agency Approval



Transfer Request Submit to NARA



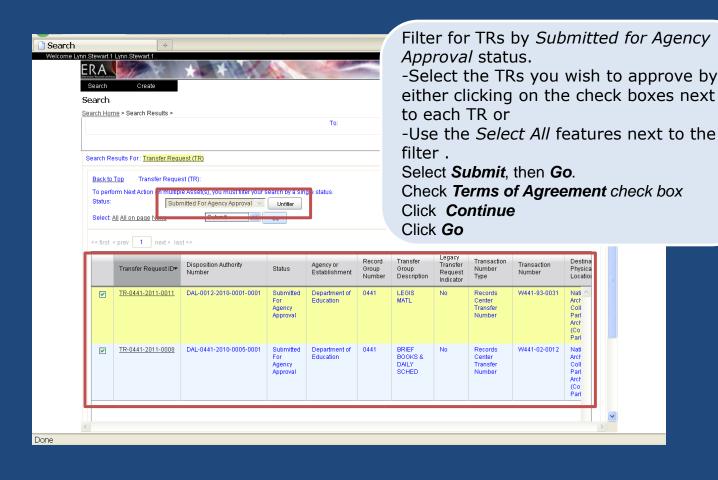
Transfer Request Terms of Agreement



Transfer Request Use SAMO to Propose TRs

- An Agency Approving Official may also use the Single Action, Multiple Objects (SAMO) function to submit multiple Transfer Requests to NARA for approval or to reject them.
- To approve multiple TRs using SAMO:
 - SAMO works best using the FireFox browser.
 - -Filter the search results by status: **Submitted for Agency Approval**
 - -Select the TRs you wish to approve by either clicking on the check boxes next to each TR or by using the **Select All feature next to the filter**
 - -Click **Submit**

Transfer Request Select TRs for SAMO



Transfer Request Resources

- Transferring Records:
 Lesson 1 and Lesson 2
 http://www.archives.gov/era/training/transferring
 -records.html
- ERA Agency Users Guide:
 http://www.archives.gov/records-mgmt/era/agency-user-manual.pdf
- Questions about the Annual Move: <u>annual.move@nara.gov</u>



THE NATIONAL ARCHIVES AND RECORDS ADMINISTRATION ELECTRONIC RECORDS ARCHIVES

Using ERA for FRC Annual Move

Q/A